

FEDERAL
ACQUISITION
INSTITUTE



Warrant Details Editor Task Aids

*To foster a high-performing,
qualified civilian acquisition
workforce.*



<https://www.fai.gov/>



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Table of Contents

Introduction	
Warrant Process	p.4
Warrant Approval Workflow by Agency	p.5
Warrant Applicant Management	
Add User to a Warrant Candidate Group	p.8
Locate a Warrant Request in the Workflow	p.11
Proxy Enroll User in a Warrant Certification	p.15
Update Training Details	p.19
Reports	
View and Download Custom Reports	p.22
Additional Resources	
Additional Resources	Pg.25



Introduction



Warrant Process

Part 1: Form Component:

1. Warrant Details Editor enrolls User in Certification Candidate group to provide application form access
2. Warrant Details Editor notifies User that they have access to the form
3. User completes the Warrant application form
4. The application form routes through approval workflow
5. Warrant Approvers approve, deny, or deny and return the form
6. Warrant application form moves to Approved status after final approval level

Part 2: Certification component

1. User is enrolled in the corresponding Warrant Certification by the Warrant Details Editor (using reports to identify Users)
2. When User completes all Certification requirements they are marked as “Certified” in the Certification

Part 3: Test Component

1. User is dynamically enrolled in test
2. User does not receive notification they have been enrolled in the test
3. Warrant Details Editor uses reports to identify Users that have been enrolled in the test
4. Warrant Details Editor enters Warrant information (ex. Warrant ID, Limitations) and notifies User they can complete the test
5. User completes the test
6. User accesses their SF-1402

Warrant Approval Workflow by Agency

Agency	Workflow
DOI	DOI Warrant Approvers Level 2 DOI Warrant Approvers Level 3 DOI Warrant Approvers Level 4
DOJ	DOJ Warrant Approvers Level 2 DOJ Warrant Approvers Level 3
DOL	Manager DOL Warrant Approvers Level 2 DOL Warrant Approvers Level 3 DOL Warrant Approvers Level 4
DOT	Manager DOT Warrant Approvers Level 2 DOT Warrant Approvers Level 3
ED CAM	Manager ED CAM Warrant Approvers Level 2 ED CAM Warrant Approvers Level 3 ED CAM Warrant Approvers Level 4 ED CAM Warrant Approvers Level 5
ED FSA	Manager ED FSA Warrant Approvers Level 2 ED FSA Warrant Approvers Level 3 ED FSA Warrant Approvers Level 4 ED FSA Warrant Approvers Level 5

Warrant Approval Workflow by Agency (Cont. 1)

Agency	Workflow
EPA	Manager EPA Warrant Approvers Level 2 EPA Warrant Approvers Level 3 EPA Warrant Approvers Level 4
GSA	Manager GSA Warrant Approvers Level 2
HHS	Manager HHS Warrant Approvers Level 2 HHS Warrant Approvers Level 3 HHS Warrant Approvers Level 4
OPM Healthcare & Insurance	OPM Healthcare Warrant Approvers Level 2 OPM Healthcare Warrant Approvers Level 3 OPM Healthcare Warrant Approvers Level 4
Treasury MINT	Manager Treasury MINT Warrant Approvers Level 2
Treasury	Manager
USDA	USDA Warrant Approvers Level 2
VA	VA Warrant Approvers Level 2

For questions of who is in each workflow, please contact your ACM.

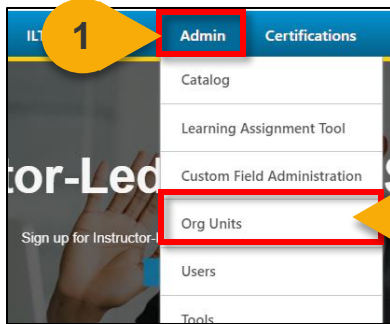
Warrant Applicant Management



Add User to a Warrant Candidate Group

When you want to give a Warrant candidate access to a Warrant Form...

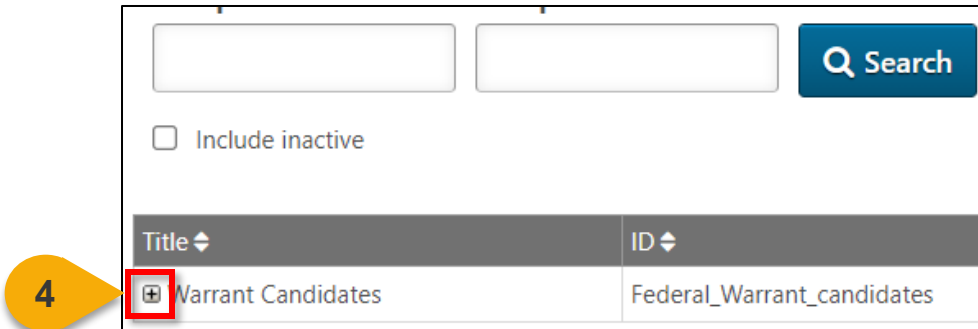
Steps 1 & 2: Hover over the **Admin** tab, then click **Org Units**.





Step 3: Click **Manage Organizational Unit Hierarchy**.



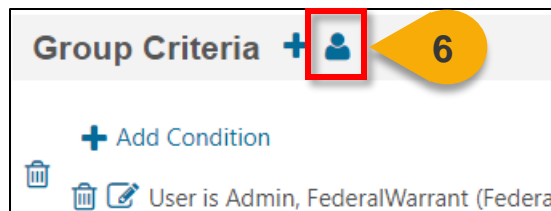
Step 4: Click the + next to **Warrant Candidates** to view the Agency Warrant Candidate groups.



Steps 5: Locate your **Agency's Warrant Candidate group** and click the **Edit icon** in the **Options** column.

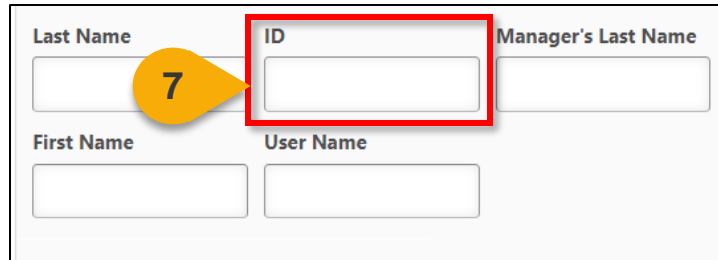
Title	ID	Last Processed	Options
DOI Warrant Candidates	DOI_WarrantCandidates	2:41 PM 4/22/2021	
DOJ Warrant Candidates	DOJ_WarrantCandidates	10:25 AM 4/22/2021	

Step 6: Scroll down to the **Group Criteria** section. Click the **User icon**.



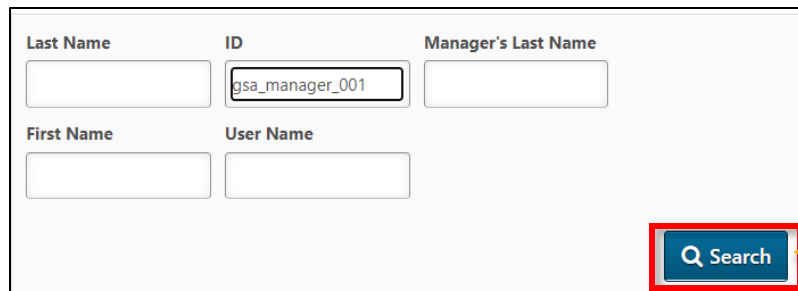
Add User to a Warrant Candidate Group (Cont. 1)

Step 7: A new window will open. Enter the Warrant Candidate's DAU ID into the **ID** field.



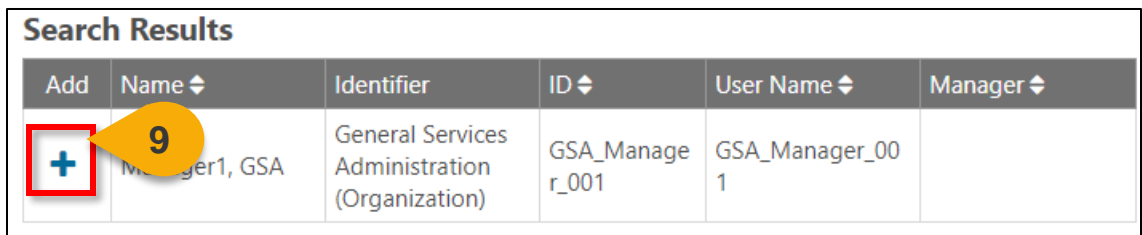
The form contains five input fields: Last Name, ID, Manager's Last Name, First Name, and User Name. The ID field is highlighted with a red rectangular box. A yellow callout bubble with the number 7 points to the ID field.

Step 8: Click **Search**.




The form is the same as in Step 7, but the ID field now contains the text 'gsa_manager_001'. The Search button, located at the bottom right, is highlighted with a red rectangular box. A yellow callout bubble with the number 8 points to the Search button.

Step 9: Click the **blue +** in the **Add column** to select the Warrant Candidate.



Search Results

Add	Name ↕	Identifier	ID ↕	User Name ↕	Manager ↕
	Manager1, GSA	General Services Administration (Organization)	GSA_Manager_r_001	GSA_Manager_001	

A yellow callout bubble with the number 9 points to the blue plus icon in the Add column of the first row.

Add User to a Warrant Candidate Group (Cont. 2)

When you want to give a Warrant candidate access to a Warrant Form...

Step 10: The Warrant Candidate will be added to the **Selected User** section. Click **Done**.

Selected User

Remove	Name	ID
	Manager1, GSA	GSA_Manager_001

Search Results

Add	Name	Identifier	ID	User Name	Manager
N/A	Manager1, GSA	General Services Administration (Organization)	GSA_Manager_001	GSA_Manager_001	

(1 Result)

Close Done

10

Step 11: The Warrant Candidate will populate in the **Group Criteria** section on the **Edit Warrant page**. Click **Save** to finish adding the Warrant Candidate to the group. You will be returned to the Manage Group page.

Group Criteria +

+ Add Condition

User is Manager1, GSA (GSA_Manager_001)

+ Add Condition

User is Admin, FederalWarrant (FederalWarrantAdmin)

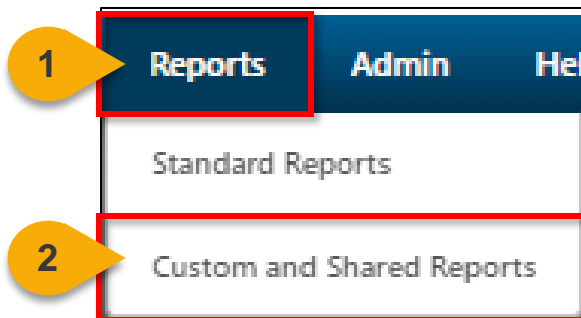
11 Save

Locate a Warrant Request in the Workflow

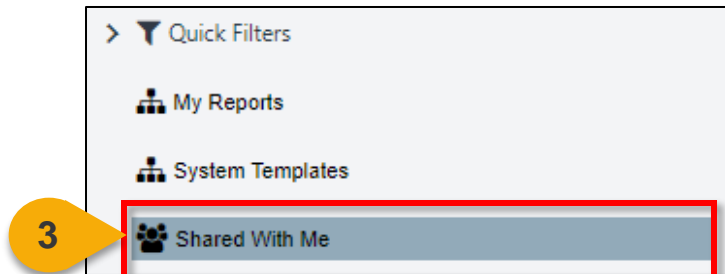
When you want to determine at which level the request is pending action...

Note: This task aid will support you in identifying at which level(s) a request has been approved to determine which level is currently assigned the request. Please view the Warrant Approval Workflow task aid to determine the next level in your agency's workflow. Please view the View and Use Security Roles Report task aid to identify individual users within that approval level.

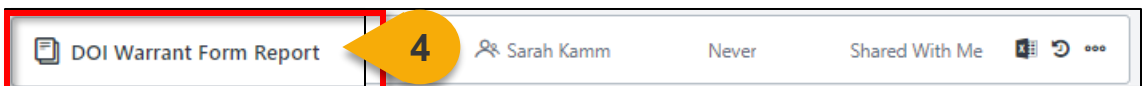
Steps 1 & 2: Hover over the **Reports** tab and then click **Custom and Shared Reports**.



Step 3: From the filters on the left, click **Shared with Me**.



Step 4: Locate the **Warrant Form Report** for your agency and click the title to open it.



Locate a Warrant Request in the Workflow (Cont. 1)

Step 5: For **Form Title**, choose **contains** from the dropdown. Type **warrant** in the second box and **press enter**.

Step 6: For **Form Approval Status**, choose **is one of** from the dropdown. Then select the **Pending Approval** status from the second dropdown. (Note: You may choose additional options as relevant to your inquiry.)

Step 7: For **Organization**, choose **is one of** from the dropdown. Then click **Select Org Units**.

DOI Warrant Form Report

▼ Filters

Form Title contains [x] warrant [x]

Form Approval Status is one of [x] Pending Approval [x]

AND Organization is one of [Select Org Units]

What Warrant level are you applying for? (ID: 40) is one of [Select...]

What dollar amount will you be authorized for? (ID: 41) is equal to [default value]

Step 8: Drill down into **Federal Organizations** by clicking the **arrow** on the right.

Select Org Units

SEARCH SELECTED (0)

ORGANIZATION Search by Title FILTERS

☐ **Federal Organizations** Type: Organization ID: FO Status: Active Parent: DAU Registrar Owner: N/A

Locate a Warrant Request in the Workflow (Cont. 2)

Step 9: Continue to drill down until you find your agency on the list and click the checkbox.

Select Org Units

SEARCH SELECTED (1)

ORGANIZATION Search by Title FILTERS

Top Node : Federal Organizations

<input type="checkbox"/>		Department of Housing and Urban Development	Type: Organization ID: LM Status: Active Parent: Federal Organizations Owner: N/A
<input checked="" type="checkbox"/>		Department of Interior	Type: Organization ID: LN Status: Active Parent: Federal Organizations Owner: N/A

Step 10: Click the **Selected** tab at the top of the window.

Select Org Units

SEARCH **SELECTED (1)**

Department of Interior

Step 11: Ensure **Include Subordinates** is checked.

Department of Interior

Type: Organization ID: LN Status: Active Parent: Federal Organizations Owner: N/A

☒ Include Subordinates

Step 12: Click **Select**.

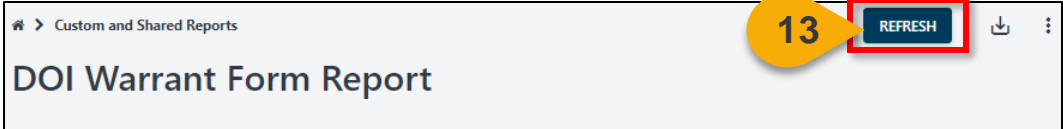
Department of Interior

☒ Include Subordinates

SELECT

Locate a Warrant Request in the Workflow (Cont. 3)

Step 13: From the report viewer, click **REFRESH** in the top right corner of the screen. The report will update on the bottom portion of your screen according to the filters.



Custom and Shared Reports

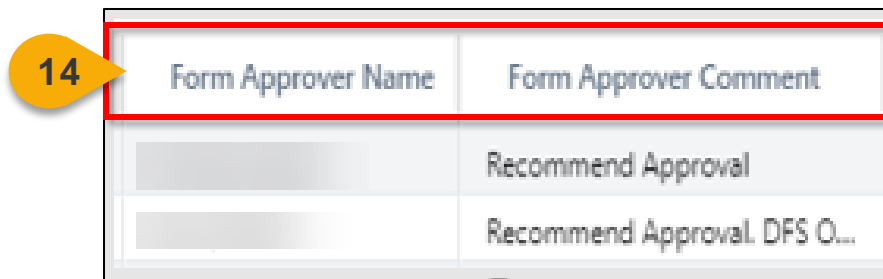
DOI Warrant Form Report

13 REFRESH

The Report Viewer will show you all **Warrant** requests that are in the **Pending Approval** status (or other selected status) for your agency.

Organization	Organization	User ID	User Last Name	User First Name	User Email	Form Title	Form Submit Date	Form Approval Status
<input type="checkbox"/> Department of Interior (12)								
<input type="checkbox"/> Bureau Of Reclamation (1)								
<input type="checkbox"/> National Park Service (3)								
<input type="checkbox"/> Office Of The Secretary Of Th...								
Office Of The Secretary Of...	Office Of The S...					DOI Warrant ...	07/21/2021 02:2...	Pending Approval
Office Of The Secretary Of...	Office Of The S...					DOI Warrant ...	07/21/2021 02:2...	Pending Approval
Office Of The Secretary Of...	Office Of The S...					DOI Warrant ...	06/22/2021 04:3...	Pending Approval
Office Of The Secretary Of...	Office Of The S...					DOI Warrant ...	06/22/2021 04:3...	Pending Approval
Office Of The Secretary Of...	Office Of The S...					DOI Warrant ...	07/23/2021 11:1...	Pending Approval
Office Of The Secretary Of...	Office Of The S...					DOI Warrant ...	07/21/2021 03:3...	Pending Approval
Office Of The Secretary Of...	Office Of The S...					DOI Warrant ...	07/21/2021 03:3...	Pending Approval

Step 14: Locate the warrant request for the user. Scroll to the right to find the **Form Approver Name** and **Form Approver Comments**. Use this information to identify the level that the request has moved to using your agency's warrant approval workflow.



14

Form Approver Name	Form Approver Comment
	Recommend Approval
	Recommend Approval. DFS O...

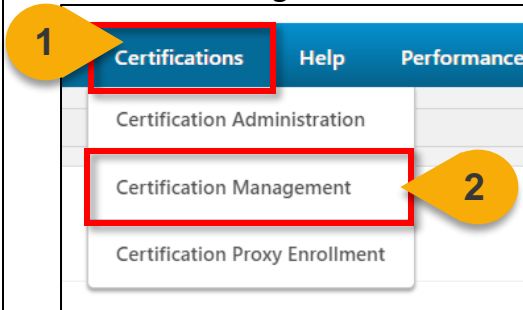
For warrant requests that have been approved at more than one level of the workflow, a separate entry will appear for each level at which the request has been approved.

The Form Submit Date will be the same for a request at each level of approval.

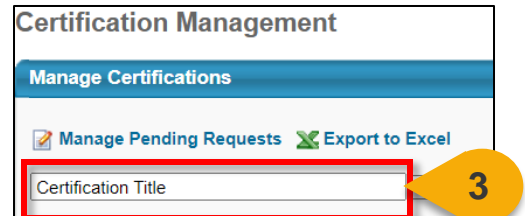
Proxy Enroll User in a Warrant Certification

When you want to enroll a User in a Warrant Certification...

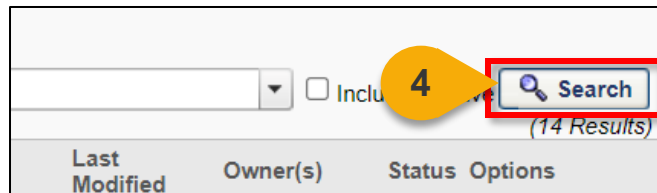
Steps 1 & 2: Hover over the **Certifications** tab, then click **Certification Management**.



Step 3: Enter the title of the certification you would like to enroll a User into using the **Certification Title** field.



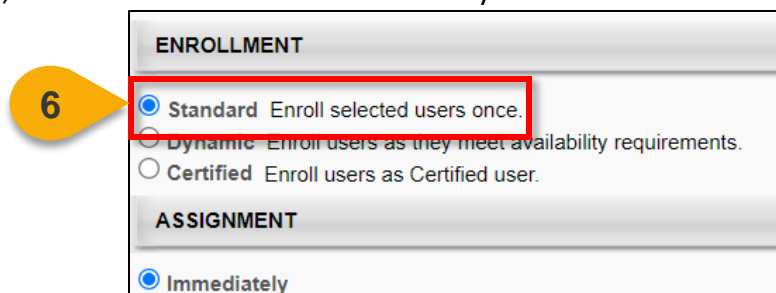
Step 4: Click **Search**.



Steps 5: Locate the certification in the search results. Click the **Add User** icon in the **Options** column.

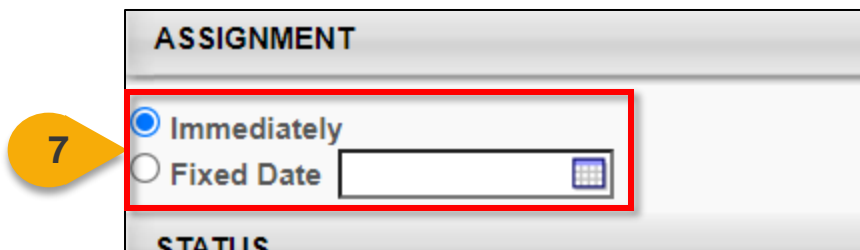
Last Modified	Owner(s)	Status	Options
4/27/2021 9:25 PM	Harvey, Tiffany	Active	

Step 6: On the **Proxy Enrollment for Certification** page, select **Standard** in the **Enrollment** section to enroll the User in the Certification. **Note:** to enroll Users as Certified, select Certified and select the date you would like them to be certified.



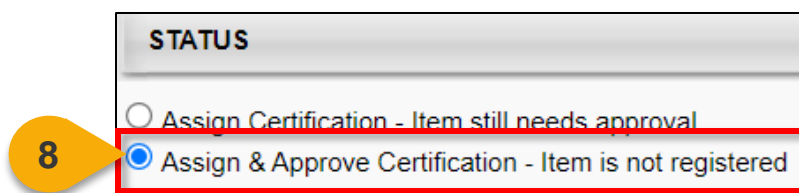
Proxy Enroll User in a Warrant Certification (Cont. 1)

Steps 7: In the **Assignment** section, select when you would like the Certification to be assigned to the User: **Immediately** or on a **Fixed Date**.



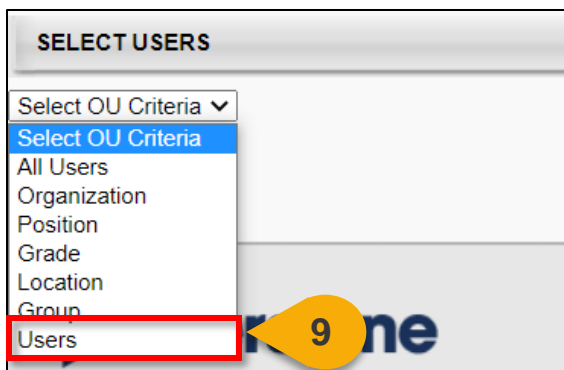
The screenshot shows a form titled "ASSIGNMENT". It has two radio buttons: "Immediately" (which is selected) and "Fixed Date" (which is unselected). A red box highlights the "Immediately" option. A yellow callout bubble with the number "7" points to the "Immediately" radio button.

Step 8: In the **Status** section, select **Assign & Approve Certification**.



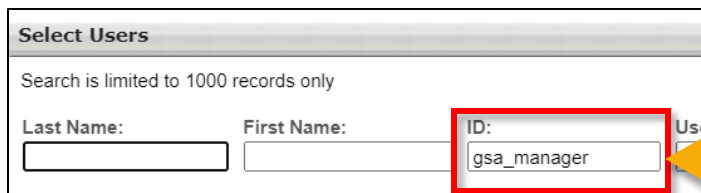
The screenshot shows a form titled "STATUS". It has two radio buttons: "Assign Certification - Item still needs approval" (which is unselected) and "Assign & Approve Certification - Item is not registered" (which is selected). A red box highlights the "Assign & Approve Certification - Item is not registered" option. A yellow callout bubble with the number "8" points to the "Assign & Approve Certification - Item is not registered" radio button.

Steps 9: In the **Select Users** section, choose **Users** from the Select OU Criteria menu.



The screenshot shows a form titled "SELECT USERS". It has a dropdown menu labeled "Select OU Criteria" with a list of options: "All Users", "Organization", "Position", "Grade", "Location", "Group", and "Users". The "Users" option is selected. A red box highlights the "Users" option. A yellow callout bubble with the number "9" points to the "Users" option.

Step 10: The **Select Users** window will open. Enter the **DAU ID** of the User you wish to proxy enroll in the **ID** field.



The screenshot shows a form titled "Select Users". It has a search bar and a table with columns: "Last Name:", "First Name:", "ID:", and "User:". The "ID:" field contains the text "gsa_manager". A red box highlights the "ID:" field. A yellow callout bubble with the number "10" points to the "ID:" field.

Proxy Enroll User in a Warrant Certification (Cont. 2)

Steps 11: Click Search.

Select Users

Search is limited to 1000 records only

Last Name: First Name: ID: User Name: Manager's Last Name:

gsa_manager

11 Search

Step 12: In the search results, click the **Name of the User you wish to proxy enroll.**

Name	User ID
12 Manager, GSA	GSA_Manager
Manager1, GSA	GSA_Manager_001

Steps 13: Back on the **Proxy Enrollment for Certification page, the User will populate in the **Select Users** section. Include Subordinates will be checked by default. **Uncheck Include Subordinates.****

SELECT USERS

Select OU Criteria ▼

Manager, GSA (GSA_Manager)

13 ☒ Include Subordinate

Step 14: Repeat steps 9 through 13 to add more Users or click **Next.**

SELECT USERS

Select OU Criteria ▼

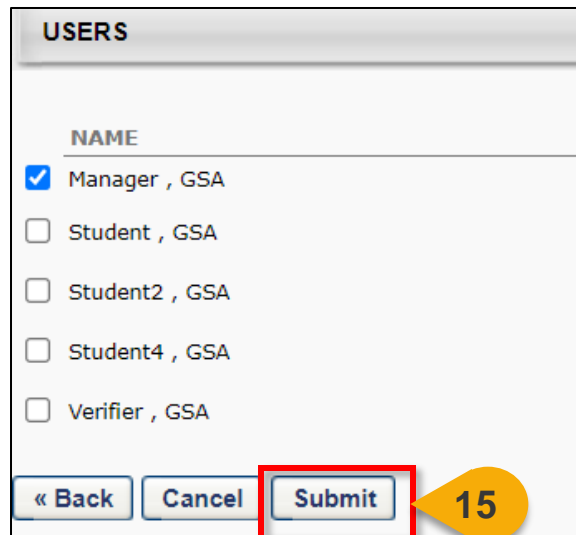
Manager, GSA (GSA_Manager)

☐ Include Subordinate

Cancel **14** Next »

Proxy Enroll User in a Warrant Certification (Cont. 3)

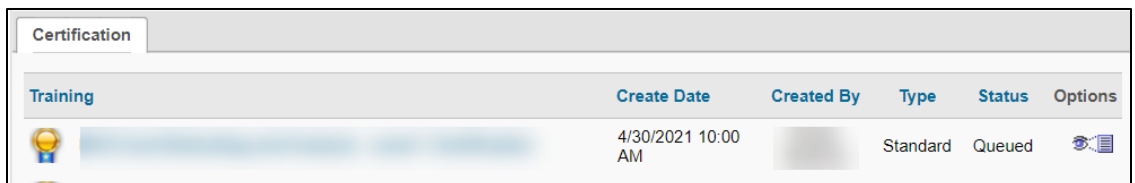
Steps 15: On the **second Proxy Enrollment for Certification page**, review the proxy enrollment information. Confirm the Users you wish to add are checked in the **Users** section. Then, click **Submit**. You will then see the **Proxy Enrollment page**.






USERS	
NAME	
<input checked="" type="checkbox"/>	Manager , GSA
<input type="checkbox"/>	Student , GSA
<input type="checkbox"/>	Student2 , GSA
<input type="checkbox"/>	Student4 , GSA
<input type="checkbox"/>	Verifier , GSA

« Back Cancel **Submit**

The **Proxy Enrollment page** will display the proxy enrollment along with its status. Within a few minutes, the proxy enrollment will process, and the status will change from Queued to Processed.

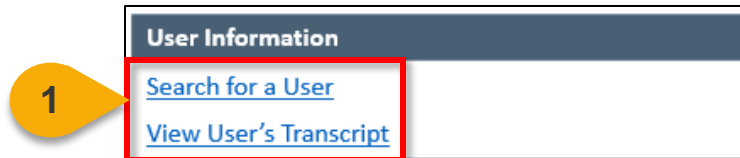


Certification					
Training	Create Date	Created By	Type	Status	Options
	4/30/2021 10:00 AM		Standard	Queued	

Update Training Details

When you want to enroll a User in a Warrant Certification...

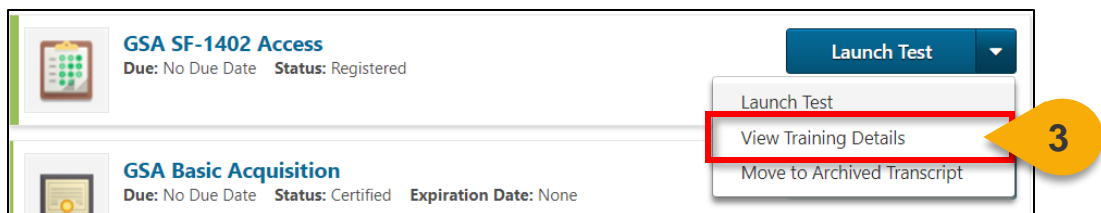
Step 1: Use the “Search for a User” and “View User’s Transcript” task aids to navigate to the User Transcript needing Warrant Details edits.



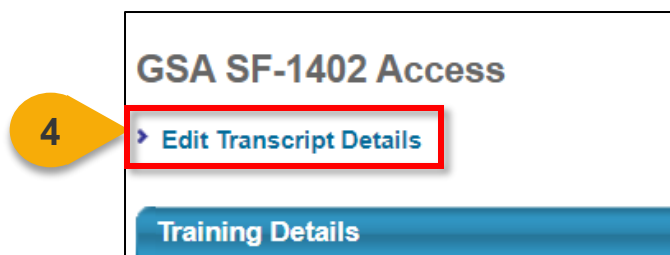
Step 2: Locate the **SF-1402 Access** test on the User’s Transcript. The title of the test will have your Agency noted at the front. Click the **dropdown arrow** across from the course name.



Steps 3: From the **dropdown menu**, select **View Training Details**.

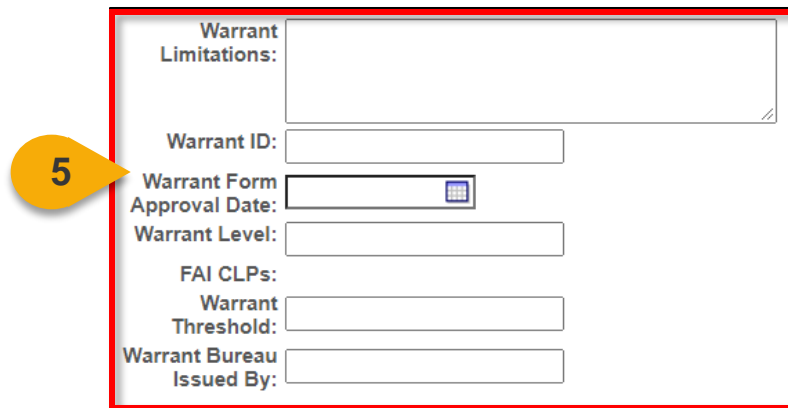


Step 4: On the training page, click **Edit Transcript Details** at the top of the page.



Update Training Details (Cont. 1)

Step 5: On the **Edit Transcript Details** page, enter the User's specific Warrant information into the **Warrant** fields.



Warrant Limitations:

Warrant ID:

Warrant Form Approval Date:

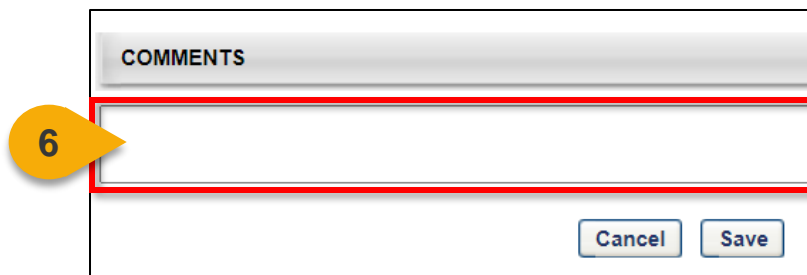
Warrant Level:

FAI CLPs:

Warrant Threshold:

Warrant Bureau Issued By:

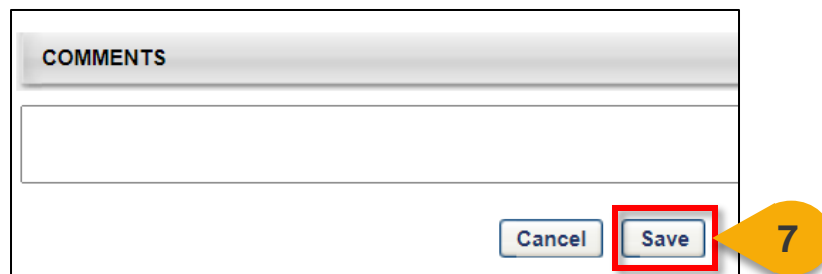
Step 6: At the bottom of the window, add a comment explaining the updates that were made into the **Comments** field.



COMMENTS

Cancel Save

Step 7: Click **Save**.



COMMENTS

Cancel Save

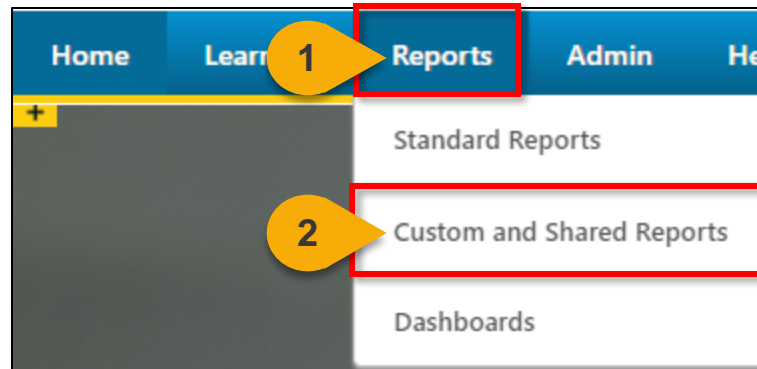
Reports



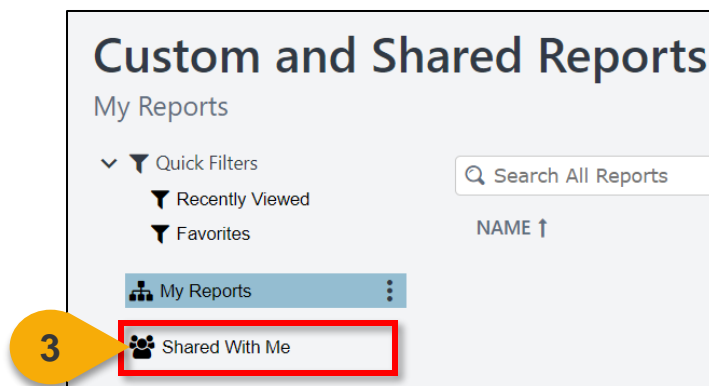
View and Download Custom Reports

When you want to filter and download a report...

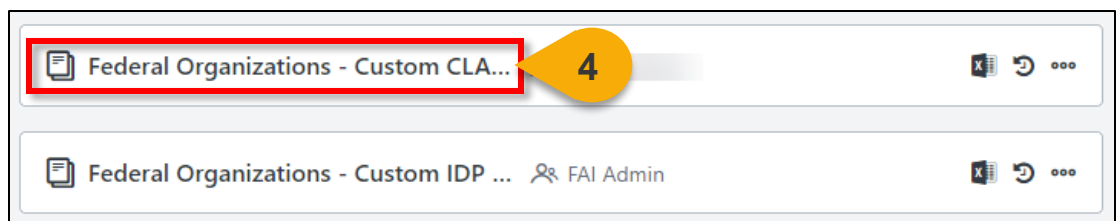
Steps 1 & 2: Hover over the **Reports** tab, then click **Custom and Shared Reports**.



Step 3: On the left-hand side of the screen, click **Shared With Me** to see reports that have been shared with you.



Step 4: Click the **Report Name** you would like to view to update the report filters.



View and Download Custom Reports (Cont. 1)

Step 5: Update the **filters** as needed. The filters will vary based on the report.

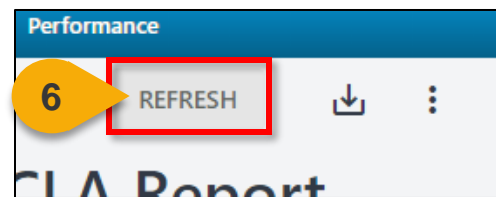
▼ Filters

5 Certifications - Certification Category is equal to FAC-C Continuous Learning

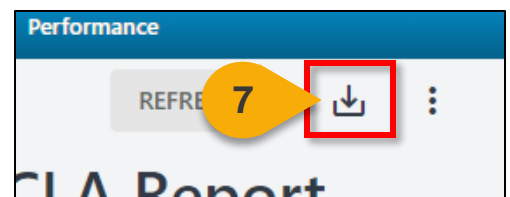
AND Certifications - Certification User Status is one of Select...

Calculated Fields - Days Until Certification Period Due is greater than 0

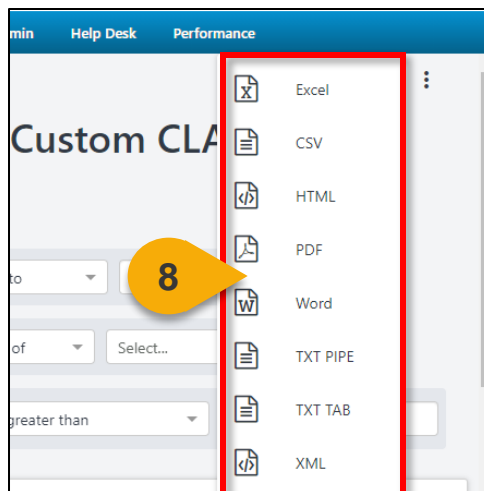
Step 6: Click **Refresh** in the top right corner to see a sample of the newly-filtered report on the bottom portion of the page.



Step 7: Click the **Download Options** icon in the top right corner to see the formats available for this report.



Step 8: Choose the **File Format** in which you would like to download the report. The report will download to your computer.



Additional Resources



Additional Resources

Support Area	Support Provided	Contact
Defense Acquisition University (DAU) Help Desk	<ul style="list-style-type: none"> FAI CSOD System Questions and Issues FAI CSOD System Errors and Troubleshooting Password Issues and Resets 	Email: DAUHelp@dau.edu Phone: (703) 805-3459, X1
Your Agency's Acquisition Career Manager (ACM)	<ul style="list-style-type: none"> Agency-specific Acquisition Training, Certification, and Continuous Learning (CL) Requirements Agency-specific Acquisition Policies and Procedures Career Development Training and Development Opportunities 	https://www.fai.gov/humancapital/acquisition-career-manager-acm
FAI CSOD Training Materials and Online Resources	<ul style="list-style-type: none"> Task Aids for FAI CSOD Roles FAI CSOD Training Videos Other Guidance for Performing Tasks in FAI CSOD 	https://dau.csod.com/catalog/CustomPage.aspx?id=221000511 https://dau.csod.com/catalog/CustomPage.aspx?id=221000509
FAI Website FAQs	<ul style="list-style-type: none"> FAI CSOD Migration Acquisition Training Federal Acquisition Certifications (FAC-C, FAC-COR, FAC-P/PM) More! 	https://www.fai.gov/page/migration-faitas-fai-cornerstone-ondemand-csod-faqs
FAI Staff	All other questions	faicsod@gsa.gov